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Peer-to-Peer Training Facilitator's Guide

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Fort Knox Research Unit

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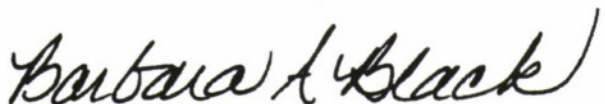for the Behavioral and Social Sciences**

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14. ABSTRACT *(Maximum 200 words)*:

The peer-to-peer (P2P) training approach involves small groups of people from similar social groupings, who are not professional teachers, helping each other to learn. The P2P approach has great potential for rapidly identifying emerging lessons learned and integrating these into wide-reaching Army training. However, to ensure that the potential of P2P training is realized, the Army needs to identify the instructional principles and best practices supporting effective P2P training and incorporate these into a Soldier-friendly facilitator's guide. The present research resulted in the development of a P2P Training Facilitator's Guide which incorporates best practices in P2P training from academia, industry, and the military. As part of the research process, the guide was reviewed during formative evaluation and revised. This report contains a brief overview of the project and the complete P2P Training Facilitator's Guide.

15. SUBJECT TERMS

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Introduction

The United States Army faces a great challenge to rapidly develop, deliver, and assess Soldier training in response to constantly evolving threats. Soldiers need to learn quickly from other Soldiers who have gained experience and insights in ways to counter the threat (Woodie, 2005). In response to this requirement, the Army needs to leverage the potential of peer-to-peer (P2P) training, which refers to the acquisition of knowledge and skill through active helping and supporting among equals. The P2P training approach involves small groups of people from similar social groupings, who are not professional teachers, helping each other to learn (Topping, 2005). Often P2P training is led by a facilitator whose function it is to move learners through problem identification, idea generation, feedback, and solution clarification.

The P2P training approach has great potential for rapidly identifying emerging lessons learned and integrating these into wide-reaching Army training. However, to ensure that the potential of P2P training is realized, the Army needs to identify the instructional principles and best practices supporting effective P2P training and incorporate these into a Soldier-friendly facilitator's guide. Not all Soldiers are naturally skilled at facilitating discussions. Soldiers may revert to the role of a lecturer if group members do not contribute to a discussion. The facilitators' guide serves to provide a structure for discussions and tools the facilitator can use to bring out the good ideas that experienced Soldiers possess. The purpose of the facilitators' guide is to make preparation for a group discussion easier and to increase the likelihood that members will contribute to achieve a specific goal.

The implementation of P2P training sessions supported by the Facilitator's Guide could have several advantages for Army training:

- The P2P training approach appears ideal for adult learning. Adults learn best when they are working on current, real-life challenges and exchanging feedback with others in similar situations (Senge, 1990).

- The P2P training approach supports the generation of new knowledge. Through reflection on specific events, discussion, and feedback, P2P exchanges can generate new explicit knowledge from participant's unspoken tacit understanding (Cianciolo, Antonakis, & Sternberg, 2001).

- Participants and facilitators can make gains in group cohesion, knowledge, and problem solving skills (Topping, 2005).

- The P2P training approach can complement traditional forms of learning. The P2P training can build on traditional lecture presentations by encouraging the recurring exchange of ideas between learners and by providing a source of feedback to institutional training managers on training needs and solutions (Woodie, 2005).

- The P2P training approach can accommodate the flexible scheduling necessary to allow adult learners to attend professional development sessions. In P2P training programs, peers often can schedule and locate their own learning sessions which makes the sessions very accommodating to busy schedules (Authenticity Consulting, 2007).

This document provides a summary description of the development of the P2P Training Facilitator's Guide (referred to here as the "Facilitator's Guide"). The complete Facilitator's Guide is provided as Appendix A. A detailed description of the research conducted to develop the Facilitator's Guide is presented in Costanza, Leibrecht, Cooper, and Sanders (in preparation).

Method

The research method involved 1) a review of the literature and training practices to identify best practices for P2P training 2) the development of the Facilitator's Guide which provides a framework for developing, delivering, and assessing P2P training, and 3) the formative evaluation of the Facilitator's Guide by representative Army officers through the conduct of training sessions in both face-to-face and video teleconference environments.

Four approaches were used to identify best practices for P2P training from academia, industry, and the military. First, a literature review was conducted to investigate three areas of P2P training: development, delivery, and assessment. Sources ranged from academic journals to popular industry books. Second, four interviews were conducted with experienced P2P facilitators and coordinators from academia, military, and industry. Within the military, interviews were conducted with facilitators and coordinators involved with knowledge management initiatives such as the Battle Command Knowledge System (BCKS) and Stryker Symposiums. Third, an observation of a Stryker Symposium was conducted, and a Supplemental Instruction Workshop at the University of Missouri-Kansas City was attended. As a fourth approach, instructional program materials from BCKS handbooks and academic web sites were examined.

The Facilitator's Guide was developed through a process of cross-walking P2P training principles against the requirements to develop, deliver, and assess training. A formative evaluation of the facilitator's guide was conducted with representative Army officers (five captains and six lieutenants). Three of the captains used the Facilitator's Guide to plan and conduct training sessions with the other officers. Three training sessions were conducted with two sessions performed in a face-to-face environment, and one session performed in a video teleconference environment. Data collection included researcher observations, participant pre- and post-training surveys, and participant interviews. Based on the results of the formative evaluation the Facilitator's Guide was revised.

Product

The Facilitator's Guide provides a format and structure that helps a facilitator to quickly and easily develop, deliver, and assess a P2P training session. The structure of the guide includes a review of the P2P process: a decision tree following the three stages of develop, deliver, and assess; detailed guidance on how to accomplish each of the three stages; practical exercises and best practice solutions; resources; and job aids. Key features of the P2P training development, delivery, and assessment process were summarized in the form of a decision tree flowchart with connector blocks and arrows that facilitators would likely follow as they moved through the three stages of P2P training. A number of job aids were included in the appendices of the guide: P2P Training Steps and Procedures Checklist; Facilitator Planning Worksheet; Pre-

and Post-Training Participant Surveys; Facilitator Session Assessment Form; and Facilitator Socratic Questions.

Practical exercises were developed to provide training facilitators with practice in using the decision tree and the process steps. The practical exercises presented problem-based scenarios that the facilitator might encounter in a group P2P training session. The guide was formatted for both hard-copy and digital delivery. The theory and practical exercise sections of the guide were hyperlinked to make navigating through the guide easier for the reader. The guide was refined based on feedback and data collected in the guide formative evaluations.

Utilization

The results of the research provided evidence that the Facilitator's Guide can be a useful tool for Soldiers to employ when conducting group training sessions. The ratings and comments obtained from the facilitator and participant feedback forms tended to be positive. Soldiers serving as facilitators in the formative evaluation perceived the Facilitator's Guide as providing useful structure within the informal small group discussion format. They also viewed the training sessions as beneficial to the participants. Given those results, utilization of the structured approach and facilitation tools provided in the guide could facilitate discussions in small group sessions and in Army forums such as BCKS. Plans call for the guide to be incorporated into updated BCKS facilitator training materials.

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Appendix A

Peer-to-Peer Training Facilitator's Guide

Peer-to-Peer Training Facilitator's Guide
A Knowledge Exchange Tool for Soldiers

1LT Garcia's Success: Countdown to a VTC

0600 hours, Forward Operating Base (FOB) Gold Sun, Iraq, First Lieutenant (1LT) Garcia is assigned the responsibility to facilitate a video-teleconference (VTC) between his unit's platoon leaders and the platoon leaders from a unit that will be deploying to his area of operations (AO) in a month. He will lead the group discussion to gather tactics, techniques, and procedures (TTPs) and lessons learned, but with such short notice, where should he start?

0700 hours, 1LT Garcia reads the *Peer-to-Peer Training Facilitator's Guide*. Working through the decision tree, he learns about the three stages of peer-to-peer (P2P) training: development, delivery, and assessment.

0800 hours, 1LT Garcia reflects on his deployment experiences. He asks himself several questions, such as "What do these Soldiers most need to know?" and "How will I know if they have learned it?" He writes out a measurable training objective, a session title, an agenda, and session rules. Based on the number of Soldiers participating, he selects a group discussion format.

0900 hours, VTC, 1LT Garcia introduces himself and starts the session. He uses the sample introduction in the *P2P Training Facilitator's Guide* to explain the purpose of P2P training. He tracks and follows the agenda. He gives a pre-training survey and assesses learning before the session, presenting the group with a situation based on his experiences.

1000 hours, 1LT Garcia checks for understanding and assesses learning during the session with guided questions. Soldiers are fully participating as 1LT Garcia uses collaborative learning techniques.

1100 hours, 1LT Garcia ends a successful P2P training session with closure techniques and gives a short post-training survey.

This guide will help you be a better facilitator.

What is P2P training?
P2P training is a method for Soldiers with experience to share their knowledge and lessons learned with other Soldiers. The purpose of P2P training is to obtain good ideas, evaluate the ideas, and record them as emerging TTPs, Lessons Learned, or Standing Operating Procedures (SOPs). The P2P training is led by a P2P training facilitator in an informal setting among peers.

What is a P2P training facilitator?

This guide will help you:
- Develop P2P training
- Deliver P2P training
- Assess P2P training
- Choose session strategies
- Use collaborative learning techniques

A P2P facilitator develops, delivers, and assesses the training. Their job is to help other Soldiers think about the topic, express and evaluate ideas, and record good ideas. The P2P facilitators do not lecture. The tools and techniques in P2P training are designed to take the facilitator out of the "expert lecturer" role. The P2P process places responsibility on the Soldiers to share ideas, resolve differences, and generate effective TTPs based on real-world experience that can be shared with others.

Who should use this guide?
This guide is intended to enable Soldiers selected to facilitate a P2P training session to understand the purpose of P2P training and their role as a facilitator. This guide may also be used by Soldiers who will participate in P2P training to understand the P2P process and expected outcomes.
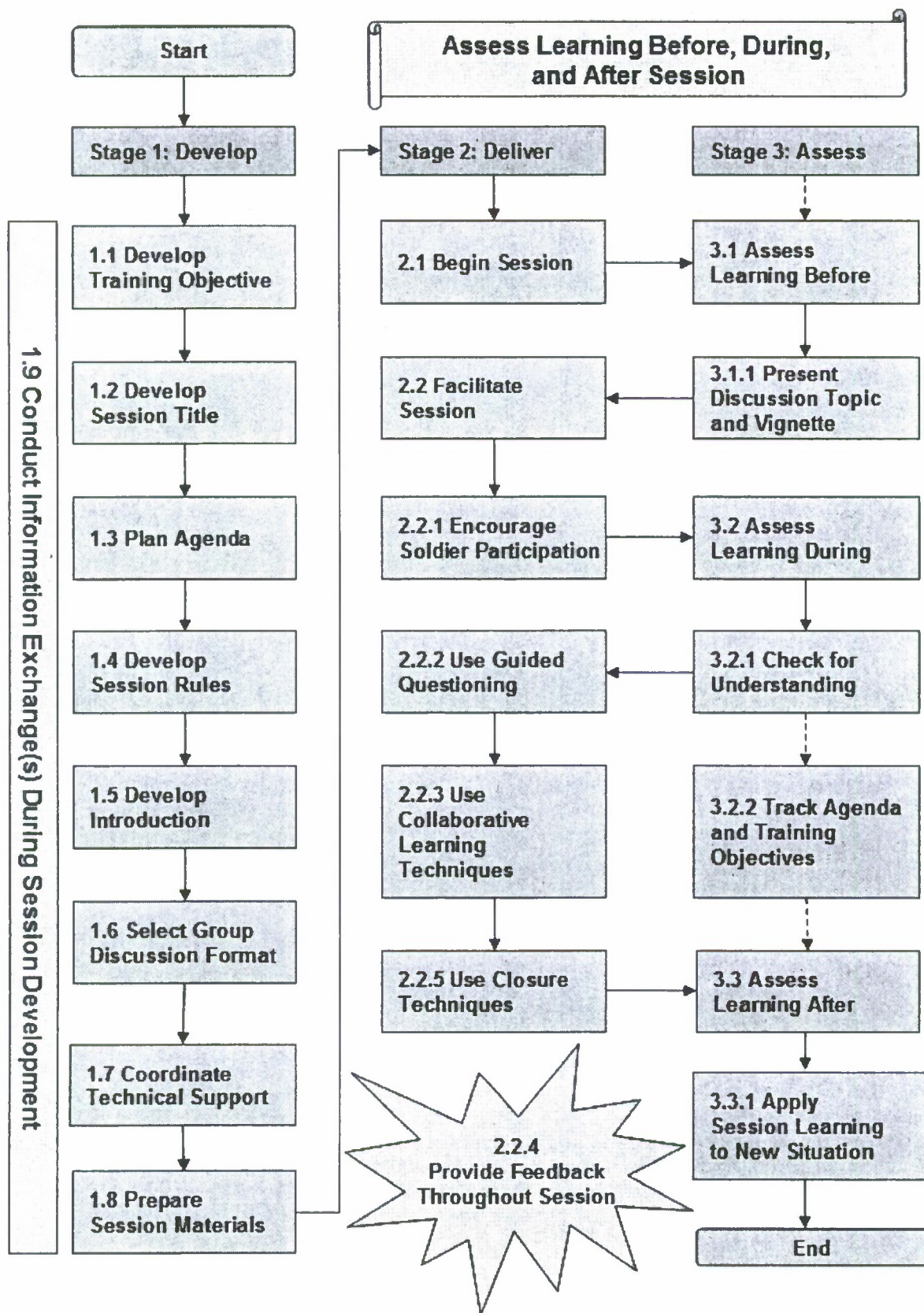
Figure 1. P2P Training Facilitator's Guide Decision Tree.

Stage 1: Develop P2P Training

(See <u>Facilitator Planning Worksheet</u> in Job Aids for a blank outline to use while you develop P2P training.)

1.1   **Develop a measurable training objective.** Training objectives may already be developed for the session. However, you may be required to develop them yourself. If so, ask yourself "What do these Soldiers most need to learn, and how will I measure that they learned it?" Incorporate the commander's intent and obtain his approval for the P2P training objective. When time allows, poll the Soldiers scheduled to participate in the session to determine what they already know about the topic and identify any focus issues they want to address.

Example: Discuss Soldier experiences with culture and language in al-Anbar Province in order to prepare inbound Soldiers for interacting with the local population. At the conclusion of the session, the inbound Soldiers will understand guidelines for interacting with the local population.

1.2   **Develop a session title.** Develop a descriptive title based on the training objective and the session topic.

Example: "Culture and Language in al-Anbar Province: Lessons Learned"

1.3   **Establish a session agenda.** Consider time constraints, and prepare the agenda. Present the training objective as the purpose of the session. Include a post-session assessment practical exercise when time permits.

Example: Introductions
Purpose of the session [Measurable Training Objective]
Session rules
Discussion on topic
Practical exercises [Post-session Assessment]
Wrap-up

1.4   **Develop session rules.** The rules are guidelines to enable discussion and keep the session focused on the training objective.

Example: All participate in the discussions
Respect others' opinions
Allow others to speak
Stay on track

1.5   **Prepare an introduction.** Introduce yourself, the other members of the group, and explain the purpose of P2P training and your role as the facilitator.

Example: "P2P training uses discussion among peers to collaborate, evaluate, and record successful experiences as TTPs, Lessons Learned, or SOP. The purpose of this session is to inform inbound Soldiers about our experiences with culture and language in al-Anbar Province. At the conclusion of the session, the inbound Soldiers will understand guidelines for interacting with the local population. I've been a platoon leader for the past eight months in this area. My platoon interacts daily with the local population as a routine matter. We are constantly seeking ways to improve our relationship with the locals, and I'm prepared to share with you what we've learned."

1.6   **Determine group discussion format.** Make a deliberate decision about how to arrange group members to get the types of cross discussion required for success. Deliberately arranging group members and assigning specific tasks to each group shifts responsibility for learning onto the

group. The assigned tasks serve to involve the Soldiers and keep them focused on the training objective. If the group is larger than 12 members, then divide the group into smaller sub-groups. An ideal group number is between 8 to 12 members. Whether face-to-face (F2F), online, VTC, or teleconference, the group discussion format should resemble a tribe sitting in a circle around a campfire sharing stories. Avoid a group format that looks like a lecture hall, where the instructor stands as the "sage on the stage" and the students are in rows. For example, if the session is F2F and there are more than 12 participants, consider dividing into smaller groups by using the *jigsaw* or the *cluster* technique to enable more participation. Figure 2 illustrates appropriate group discussion formats for each forum (the circles with inverted exclamation marks or numbers represent a group member in the discussion format). Section 2.2.3 provides a detailed description of each of the group discussion formats.
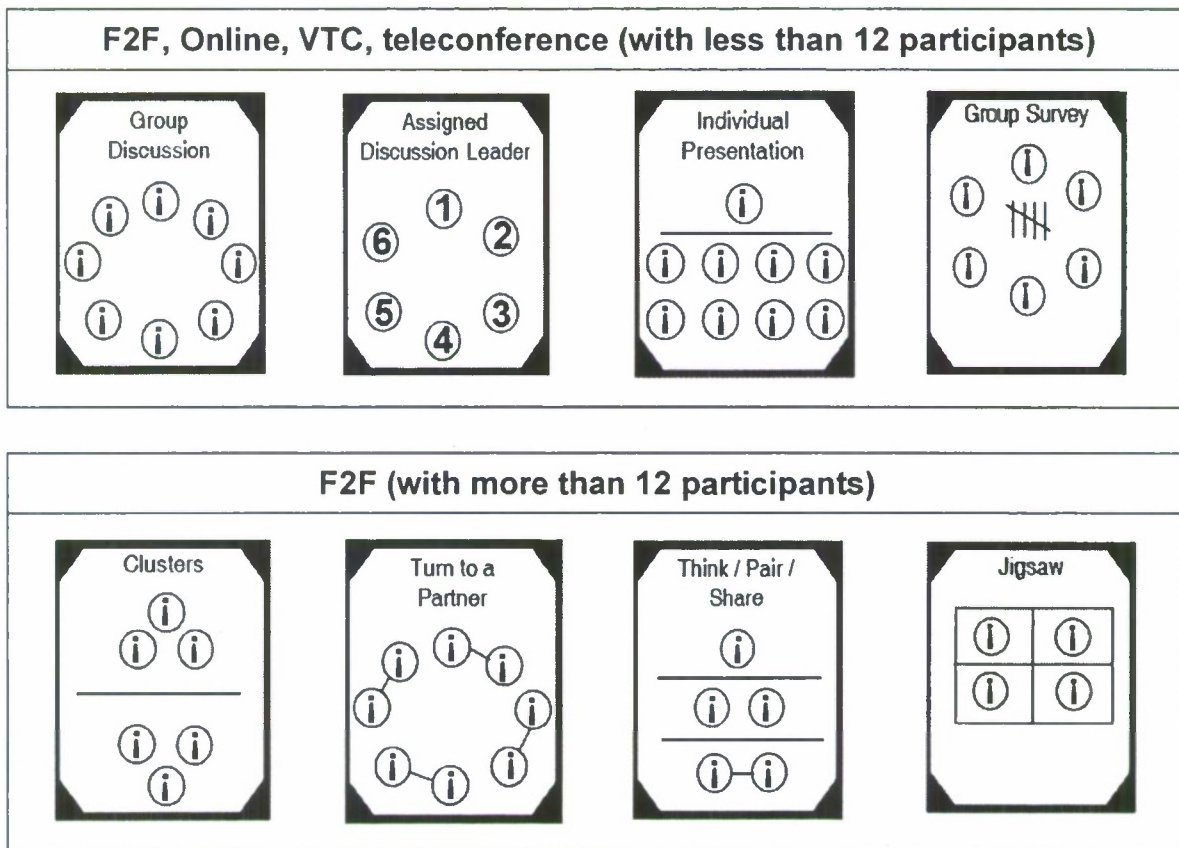
Copyright by the Curators of the University of Missouri, 2006. Adapted with permission.

Figure 2. Selecting a Group Discussion Format.

1.7 **Coordinate for technical support.** Coordinate for required personnel and technical equipment. This may include reserving audio-visual equipment, as well as reserving personnel to assist with setting up and recording the session. Conduct audio-visual checks and confirm room availability prior to the session. If audio/videotape capability is not available, arrange for a third party to take notes during the session.

1.8 **Prepare session materials.** If the session is F2F, make writing and recording tools available to Soldiers, such as butcher paper, whiteboard, etc. Prepare informational and data collection handouts. This includes Pre-Training Survey and Post-Training Survey assessments (see Job Aids).

1.9   **Conduct an information exchange.** When possible, conduct an information exchange prior to the session so Soldiers come prepared to discuss topics and develop questions they want to have answered. This could be in any medium such as a read-ahead packet or an information brief. An information exchange also enables the facilitator to ensure the session covers special focus areas identified.

1.10   **Special considerations for VTC or online forum development.** All previously discussed P2P development steps apply to P2P F2F, VTC, or online professional forum training sessions. Special considerations to support VTC and online forum P2P training sessions include the following:

- Notify Soldiers well in advance with instructions for accessing, logging on, and participating in the session.
- Allow ample time for audio and visual checks.
- Collect and post read-aheads online to improve Soldiers' background knowledge on the topic.
- Maintain situational awareness of Soldier locations and time differences.
- Be aware that deployed units may not have as much time to prepare for a session.

Stage 2: Deliver P2P Training

2.1   **Begin the session.** Introduce yourself and briefly explain the P2P training concept. Ask Soldiers to introduce themselves, provide their duty position and time in the duty position. Review the session agenda, session rules, training objectives, and why the topic is important to Soldiers. Distribute handouts and conduct the pre-training survey. A vignette may be used to assess learning before prior to initiating the discussions.

> To assess **learning before** the session starts, present a vignette of a real-world event related to the topic. Ask the group members, "What would you do in this situation?" After Soldiers have responded, ask the experienced members of the group to describe how they would respond given the same set of conditions. Assess the responses to determine the knowledge and experience levels with the topic.

2.2   **Facilitate the session**. Initiate the session by posing one or more topic questions to the group. Avoid interrupting Soldiers when they respond. Protect Soldiers from being interrupted by others. When waiting for Soldiers to respond, be prepared to allow up to 30 seconds (which may seem like a long time, but it keeps the responsibility for the discussion on the group). Do not allow one Soldier to dominate the discussion, or for the group

> To assess **learning during** a session, use guided questioning and track progress of the agenda items and training objectives. Use the Facilitator Session Assessment Form in Job Aids to determine session performance.

discussion to turn into a question and answer format (with the Soldiers directing questions to you instead of interacting with each other). Use guided questioning and collaborative learning techniques to encourage participation and assess learning during the session. Track agenda items and training objectives.

2.2.1   **Encourage each Soldier to participate.** If Soldiers are not participating, use guided questioning techniques and collaborative learning techniques to draw out and elaborate responses.

Table 1
Encourage Soldier participation

• *If* . . .	• *Then* . . .
Soldiers are participating	Continue to assess learning during the session.
Soldiers are not participating	Use guided questioning.
	Use collaborative learning techniques.
Soldiers interrupt each other	Protect Soldiers from interruptions, laughter, or those with louder voices by addressing these type interferences directly with the person responsible.
One person dominates the discussion	Redirect questions back to the group.
Session turns into a question/answer format	

2.2.2   **Use guided questioning techniques.** Guided questions are used to generate discussions, assess learning during the training session, and keep discussions focused. Guided questioning is open-ended questions to the group or an individual which require more than a "yes" or "no" response. Soldiers responding to guided questioning have a better chance to process new information by putting it into their own words. Soldier responses to questions provide the facilitator an opportunity to assess their understanding of the discussion topics. Guided questioning may be used to redirect questions back to the group by asking the Soldiers questions such as "Could you explain

that in more detail?" or "Have you had a similar experience?" When Soldiers are unable to answer questions at all, search for the answer together and avoid taking responsibility to be the one providing the answers. With P2P training and learning, the group is trusted to self-moderate and police itself for inaccurate information. For more sample questions and question starters, refer to the "Facilitator Questions" sheet in Job Aids.

Table 2
Guided Questioning Techniques

• *If . . .*	• *Then . . .*
Redirecting questions to back to the group	"Who else can comment on this question?" "Has anyone had a similar experience with this issue?"
Soldiers provide inaccurate information	Ask Soldiers to find specific references to help clarify the correct information.
Soldiers are unable to answer questions	Search for the answer as a group. Avoid taking responsibility for providing answers.
Check for understanding	Monitor for signs of confusion: "Can you be more specific?" "Can you think of another way to think about that?"
	Use action verbs: define, describe, apply, differentiate, formulate, compare, construct, recall, demonstrate
Examples: *"Would you explain that in more detail?"* *"Please clarify what you mean ..."* *"Would you be more specific?"* *"Would you give an example of that?*	*"What evidence supports that conclusion?"* *"How has that worked for your organization?"* *"How would you do that?"* *"How can you be sure of that?"* *"How might someone argue against that point?"*

2.2.3   **Use Collaborative Learning Techniques based on the group discussion format selected.** More than one collaborative learning technique may be used in a single P2P session. For example, a session may start out using *group survey* where each member is asked to briefly describe their experiences with the topic, and then transition into *assigned discussion leader.* The collaborative learning techniques used during the session depends on the size of the group, the topic, and whether the facilitator senses individuals need to become more actively engaged in the discussion. The purpose of using the collaborative learning techniques is to encourage participation, attain the training objectives, and enable each member of the group to contribute fully. Group tasks may be used in conjunction with collaborative learning techniques to get Soldiers involved and keep them on track with the training objective. The facilitator should circulate through the room while Soldiers are divided into smaller groups if it is a F2F session. The facilitator's goal is to generate discussion and encourage participation without interrupting. Maintain a presence if the session is an online, VTC or teleconference forum. Use guided questioning with each of the different types of collaborative learning techniques. Recommendations for using collaborative learning techniques are presented in Table 3.

Table 3
How to Use Collaborative Learning Techniques

Collaboration	How to Do It	Tips
Group Discussion: A general discussion of an issue or topic by the group.	Decide on a discussion topic that is of equal interest to all Soldiers. Use participation and questioning techniques to get everyone involved.	When group discussions are successful, it may be difficult to know who is leading the discussion.
Assigned Discussion Leader: One person other than the facilitator leads the group discussion.	Facilitator assigns someone else in the group a topic to lead the discussion on. Allow a little time for the discussion leader to prepare.	You may not know until you start the discussion which Soldiers may want to lead discussions.
Clusters: Soldiers are divided into smaller groups for discussion.	Assign someone in each cluster to record. Allow time for each group to report back to the larger group.	Provide each group with a flipchart or whiteboard space to record important points of their discussion.
Turn to a Partner: Each Soldier works with another on an assigned topic.	First provide the group with background information on a topic. Immediately move to discussion with a partner.	This works best when Soldiers have enough background on the topic to discuss without reviewing concepts.
Think/Pair/Share: Each Soldier works alone on an assigned topic, and then shares results with a partner.	Allow Soldiers time to think BEFORE they discuss with a partner. Give Soldiers a specific amount of time (30 seconds, five minutes, etc.) for the "think" segment of this technique.	When people are given time to think, their responses differ from those they would give if they respond immediately.
Individual Presentation: A formal presentation delivered to a captive audience.	Soldiers give a presentation on a topic, question, or issue to the group without interruption.	*Individual presentations* should be used sparingly and only when independent research is required.
Jigsaw: Each smaller group provides a piece of the puzzle to the whole.	Soldiers are divided into smaller groups to work on some aspect of the same problem. They then share their part of the puzzle with the larger group.	Ensure the limits of what each group will contribute to the topic are clearly defined.
Group Survey: Each Soldier is surveyed about the topic.	Allow each Soldier to offer or state their point of view. Keep track of the results of the survey.	A survey works best when opinions or views are briefly stated.

2.2.4   **Provide feedback throughout the session.** Provide affirmative feedback to encourage Soldier participation. Provide supportive feedback by repeating what you heard in the response, such as "I heard you say that you hesitated before entering the crowd, could you elaborate on why you hesitated?" Supportive feedback may be as simple as, "I see," or "Please continue with what you were saying." Provide corrective feedback as required. This is accomplished through questioning, such as "Can you be more specific?" or "Can you think of another way to react in that situation?"

2.2.5   **Use closure techniques to conclude the session.** Use restatement and summary closure techniques to review discussion results. Reserve the last few minutes for this process before assessing <u>learning after</u> the session. *Restatement* is asking the Soldiers to share what they thought was the most important concept(s) from the session. *Summary* involves reviewing the key points of discussion.

2.2.6   **Special considerations for VTC or online forum delivery.** All previously discussed P2P delivery steps apply to P2P F2F, VTC, or online professional forum training sessions. Special considerations to support VTC and online forum P2P training sessions include the following:

- Use available resources, such as PowerPoint, whiteboard, video, and simulations.
- Read message postings in a discussion thread in the order they were posted.
- Allow for time lags in VTC connections between overseas and stateside units.
- Have an audio or video back-up if the technology support fails.
- Provide Soldiers with an opportunity to follow-up with questions when the session ends.

Summary of P2P Best Practices
Establish measurable training objectives.
Avoid falling into traditional "Instructor – Student" roles.
Ask open-ended questions to guide dialog back to the group.
Incorporate activities to promote social interaction.
Use different group configurations to generate information exchanges.
Assign group tasks to generate active involvement and responsibility for ideas.
Require Soldiers to apply new knowledge during the session.

Stage 3: Assess P2P Training

3.1   **Learning Before.** Use a <u>pre-training survey</u> to assess what the Soldiers know about the topic before beginning the session.

> **3.1.1 Present the discussion topic**. (See section 2.1 Begin the Session in Stage 2: Deliver) <u>When initiating the session</u>, present a topic related to the training objective by giving the group a
>
> brief real-world situation based on experience. Ask the Soldiers, "What would you do in this situation?" Ask the experienced members of the group to describe how they would respond given the same set of conditions. This process enables the less experienced Soldiers to compare their responses to the more experienced members. This also allows the facilitator to assess responses and determine the group's knowledge on the topic.
>
> | **Assessing learning** before, during, and after the session overlaps within stages 2 and 3. |

3.2   **Learning During** (See section 2.2 Facilitate in Stage 2: Deliver). Check for understanding by using guided questioning techniques. Track progress in accomplishing the agenda items and attaining training objectives.

> **3.2.1**   **Check for understanding with <u>guided questioning</u>.** (See section 2.2.2 Use Guided Questioning Techniques in Stage 2: Deliver) Monitor the discussion for signs of misunderstanding and confusion among the Soldiers. Ask more questions, like "Can you be more specific?" and "Can you think of another way to solve the problem?" Question Soldiers to determine if they understand the discussion topic. Ask the group questions using actions verbs. Some actions verbs that make good starter questions are: *define, describe, apply, differentiate, formulate, compare, construct, recall, and demonstrate.*

> **3.2.2**   **Track <u>agenda</u> items and <u>training objectives</u>.** (See section 2.2.3 Use Collaborative Learning Techniques in Stage 2: Deliver) Note progress in accomplishing agenda items and attaining training objectives during facilitation. Consider using the "<u>Facilitator Planning Worksheet</u>" to track the agenda and training objectives, and the "<u>Facilitation Assessment Form</u>" to assess how well the session is working.

3.3   **Learning After**. After concluding the discussions, assess what the Soldiers learned. One method is to administer the <u>post-training survey</u>, and compare results with the <u>pre-training survey</u>. The overarching goal of assessing learning after a session is to see whether the group attained the training objective. Keep in mind that the goal of training is to apply what was learned to new and different situations. New knowledge construction is more than Soldiers simply reciting rules or repeating information.

> **3.3.1**   **Apply knowledge to a new situation.** To assess the session results, present a new situation through a vignette and require Soldiers to apply their new knowledge to that situation. Ask the Soldiers, "Based on what you learned in this session, what would you do in this situation?" You may present several situations that require applying new TTPs or Lessons Learned. Ask experienced members of the group how they would respond given the same set of conditions. Use the discussion as an opportunity to assess Soldier learning by comparing the differences between Soldier responses given prior to the session with those given at the conclusion of the session.

> **3.3.2**   **Special considerations for VTC or online forum assessment.** All of the previous assessment steps apply to a successful P2P training session for F2F, VTC, or online professional forum. To help further support VTC and online forum P2P training sessions, consider conducting an informal content analysis of the recorded VTC session or the online threaded discussion. Read through the transcripts and examine whether the

training objectives were met, how well members participated, and what new products were generated.

3.4   **Return on Investment (ROI).** P2P training ROI may be assessed by comparing the assessment of Soldier knowledge gained, with the costs associated with conducting the P2P training program. P2P training in the context of this guide is specifically designed to enhance the transfer of institutional knowledge between Soldiers. Determining the ROI for this type of P2P training program may include P2P technical and operational costs as compared to the P2P training value. Training value could be estimated in terms of the unit's ability to successfully accomplish tasks associated with missions, indicators of unit readiness, and Soldier self-reports of confidence in their unit's ability to conduct missions. The P2P training approach may also contribute to reducing the time required for the transfer of institutional knowledge.

Practical Exercises

Introduction

Use the training scenarios in these practical exercises to think through the task of preparing for a group discussion using P2P techniques. First, read the training scenario. Next, reference the guide as you answer questions about how to develop, deliver, and assess P2P training. Then, check your responses with the solutions on the following pages.

P2P Training Practical Exercise #1:

Where do I start?

As a platoon leader, you have been selected to lead and facilitate a P2P discussion between the platoon leaders of your company, who have been deployed in theatre for 8 months, and a group of platoon leaders who are training to deploy into your area of operations. There will be a total of nine Soldiers. The session will occur as part of a series of VTCs between company and battalion level leaders of the inbound and outbound units. The operations and training officer (S3) has designated the time and place the session will occur. You have received a copy of the *P2P Training Facilitator's Guide* to use in preparing for the session.

You lead daily patrols in your assigned area, where you interact with the locals. You've learned first-hand how common behavior and actions may offend the local population. You've also learned that even when trying to be "culturally correct" you can still make big mistakes if you don't understand the culture. You're just not sure where to start the group discussion. What does this group need to learn? What should you do now? Use the Facilitator's Guide to develop your responses.

Write a measurable training objective (see Stage 1, section 1.1).

_____

_____

_____

_____

Write a session title (see Stage 1, section 1.2).

_____

_____

_____

_____

Plan an agenda for the session (see Stage 1, section 1.3).

_____

_____

_____

_____

_____

_____

_____

How will you begin the session (see Stage 1, section 1.5 and Stage 2, section 2.1)?

_____

_____

_____

_____

_____

_____

How will you measure what the group of Soldiers already know about this information before the session starts (see Stage 3, section 3.1)?

_____

_____

_____

How will you assess whether the inbound group of platoon leaders is learning during the session (see Stage 2, section 2.2.5 and Stage 3, section 3.2)?

_____

_____

_____

How will you measure what the group of Soldiers have learned when the session ends (see Stage 3, section 3.3)?

_____

_____

_____

_____

P2P Training Practical Exercise #1: Best Practice Solutions

Write a measurable training objective (see Stage 1, section 1.1). By the end of this session, Soldiers will share and exchange good ideas about cultural awareness and record those ideas in an SOP.

Write a session title (see Stage 1, section 1.2). "Cultural and Situational Awareness for Platoon Leaders"

Plan an agenda for the session (see Stage 1, section 1.3).
- Introductions
- Purpose of session [Measurable Training Objective]
- Session rules
- Pre-training vignette
- Discussion of cultural awareness
- Post-training vignette
- Wrap-up discussion
- Closing of session

How will you begin the session (see Stage 1, section 1.5 and Stage 2, section 2.1)?
- Introduce yourself.
- Inform the group of the session purpose.
- Explain why the topic is important to the Soldiers.
- Request members briefly introduce themselves and provide their duty position and time in the duty position.

How will you measure what the group of Soldiers already know about this information before the session starts (see Stage 3, section 3.1)?
- Present several vignettes with situations that require applying the cultural awareness guidelines.
- Ask members of the inbound group to describe what they would do if they were in those situations.
- Assess their responses.
- Ask the platoon leaders of your unit to comment on how they would respond to the same situation (this will also start some dialogue between the two groups).

How will you assess if the inbound group of platoon leaders is learning during the session (see Stage 2, section 2.2.5 and Stage 3, section 3.2)?
- Monitor dialogue for signs of misunderstanding and confusion.
- Question Soldiers to determine if they understand.
- The following are some example phrases to use with the inbound group:
    - "*Describe some actions* that demonstrate cultural awareness."
    - "*Explain a process* for winning over the hearts and minds of the people."
    - "*Compare* how to use language cards with how to work through an interpreter."
- Use closure techniques to end a session.
    - Ask Soldiers to go over *how* an answer or solution was arrived at, rather than just providing an answer.
    - Ask Soldiers to summarize key tasks/points before moving to the next topic.

How will you measure what the Soldiers have learned when the session ends (see Stage 3, section 3.3)?
- Present several vignettes with situations that require applying what they learned in the session.
- Ask members of the inbound group to describe what they would do if they were in those situations.
- Assess their responses.
- Ask the platoon leaders of your unit to describe how they would respond to the same situations.

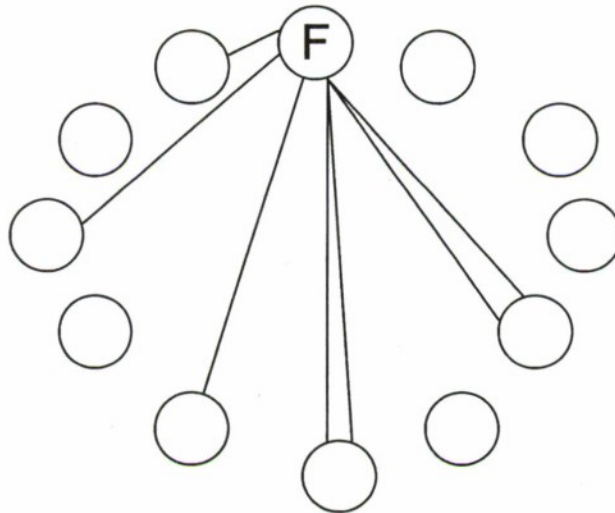## P2P Training Practical Exercise #2:

Why aren't the Soldiers participating?

You are a squad leader facilitating a F2F session between two squads, one with Soldiers who have deployed and one with Soldiers who will be deploying. Before the session started, you thought about your experiences in the first 100 days of your deployment, and wrote a series of questions and answers to address during the session. However, once the session starts, every time you ask a question addressing the session topic the group becomes very quiet. The few interactions are between you and the other Soldiers. You sense not everyone is participating fully as they should be. What should you do now?

During the session, you have lapsed into a question/answer format. You direct responses to the group, but the Soldiers respond directly to you -- there is no squad leader-to-squad leader interaction.

How will you get others to participate in the discussion (see Stage 2, section 2.2.1)?

_____

_____

_____

_____

This chart shows the interactions of the Soldiers are mostly directed to you as the facilitator (F).
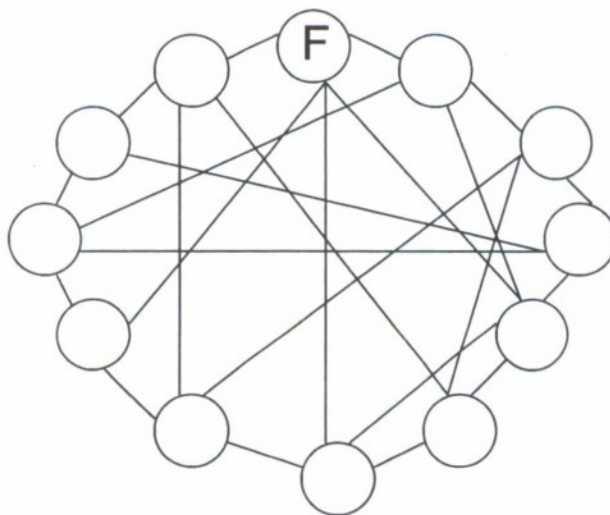

Write at least two collaborative learning techniques to encourage interaction among the Soldiers (see Stage 2, section 2.2.3).

_____

_____

_____

_____

P2P Training Practical Exercise #2: Best Practice Solutions

During the session, you have lapsed into a question/answer format. You direct responses to the group, but the Soldiers respond directly to you -- there is no squad leader-to-squad leader interaction.

How will you get others to participate in the discussion (see Stage 2, section 2.2.1)?

Do not answer the questions yourself. Redirect them to other Soldiers. Ensure all feel comfortable participating by encouraging consideration and mutual respect. The chart below shows the appropriate interactions within a group – the goal being for all to participate actively. This chart shows a general exchange between all members, not just questions and answers directed to the facilitator.

Write at least two collaborative learning techniques to encourage interaction among the Soldiers (see Stage 2, section 2.2.3).

Example #1: The group survey technique. Ask Soldiers of the inbound group to describe how they would apply the emerging TTPs to a given situation. Then ask the experienced squad leaders to share any TTPs related to a similar situation.
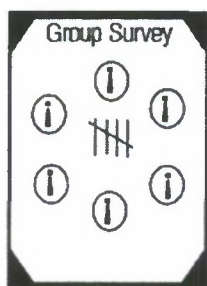

Group Survey

- Each Soldier is surveyed to discover their understanding of a topic or position on an issue.
- Each Soldier briefly states opinions or views.

P2P Training Practical Exercise #2: Best Practice Solutions (Continued)

Example #2: The individual presentation technique. Have every member of the experienced group come prepared to present a vignette to describe how they:

- Successfully accomplish task/mission X.
- Identify issues associated with task/mission X.
- Resolve issues associated with task/mission X.
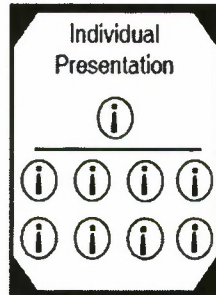
Individual Presentation

- Each Soldier prepares and delivers a presentation to the group.
- Unlike "Assigned Discussion Leader" multiple presenters deliver briefings to a captive audience.

P2P Training Practical Exercise #3:

How do I facilitate a group of 24 Soldiers?

You are a battle-proven captain with combat experience in a counterinsurgency environment, which includes IEDs. You will be leading a group discussion of approximately 24 other Soldiers, many of whom share your battlefield experiences. You're aware that not all of the Soldiers have combat experience. The session will take place F2F on post in a room that will comfortably hold 24 people. Other than the room number, you haven't been given any other guidance. You have already worked on a measurable training objective and agenda, but how do you facilitate such a large group? What should you do now?

Select a group discussion format (see Stage 1, section 1.6). Write two collaborative learning techniques to use with groups larger than 12 (see Stage 1, section 1.6 and Stage 2, section 2.2.3).

_____

_____

_____

_____

What should you check for technical support? If technical support isn't available, what should you do? (see Stage 1, section 1.7)

_____

_____

_____

_____

If you are not using handouts, what should you make available to the Soldiers? (see Stage 1, section 1.8)

_____

_____

_____

_____

P2P Training Practical Exercise #3: Best Practice Solutions

Select a group discussion format (<u>see Stage 1, section 1.6</u>). Write two collaborative learning techniques to use with groups larger than 12 (see Stage 1, <u>section 1.6</u> and Stage 2, <u>section 2.2.3</u>).

If the group is larger than 12, divide the group into smaller subgroups.

Example #1: The jigsaw technique. Divide the groups into four groups of six. Give each group a topic to discuss. Bring the groups back together to discuss as a whole in the larger group.
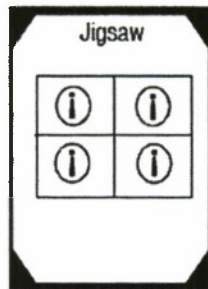
Jigsaw

- Soldiers are broken into smaller groups.
- Each group provides a piece of the puzzle and contributes to the whole.

Example #2: The clusters technique. Divide the 24 Soldiers into four groups of six. Then divide each group of six into two clusters of three. Give the clusters a topic to discuss, and then ask them to return to their group of six to share their responses.
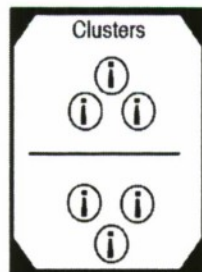
Clusters

- Soldiers are divided into smaller groups.
- Each group reports its discussion to the larger group.

What should you check for technical support? If technical support isn't available, what should you do? (<u>see Stage 1, section 1.7</u>)

Conduct audio-visual checks, room availability, and recorder availability. If technical support isn't available, coordinate for required personnel and technical equipment.

If you are not using handouts, what should you make available to the Soldiers? (<u>see Stage 1, section 1.8</u>)

Make writing and recording tools available to Soldiers, such as butcher paper, whiteboard, computer monitor, etc.

Job Aids

- P2P Training Steps and Procedures Quick Checklist
- Facilitator Planning Worksheet
- P2P Participant Survey – Pre-Training
- P2P Participant Survey – Post-Training
- Facilitator Session Assessment Form
- Facilitator Socratic Questions
- Example Unit P2P Facilitator Training Plan
- Facilitator Training Hotwash Example

P2P Training Steps and Procedures Quick Checklist

Stage 1: Develop	Yes	No
Measurable training objective		
Session title		
Agenda		
Session rules		
Introduction		
Group discussion format		
Tech support availability		
Use of handouts		
Stage 2: Deliver		
Begin session		
Facilitate session		
Soldiers participating		
Use guided questioning		
Collaborative learning techniques		
Provide feedback		
Use closure techniques		
Stage 3: Assess		
Assess learning before session		
Present discussion topic		
Assess learning during session		
Check for understanding with guided questioning		
Track agenda items and training objectives		
Assess learning after session		
Apply session learning to new situation		

Facilitator Planning Worksheet

Date _____   Time Start: _____   End: _____

Location _____

Measurable Training Objective:

_____
_____
_____
_____

Session Title: _____

Agenda: **Session Rules:**

Introduction:

_____
_____
_____
_____

Technical Support:

Learning Measures (surveys, practical exercises, etc.):

Group Discussion Format (online, VTC, F2F, diagram of format, etc.):

Notes:

_____
_____
_____
_____

P2P Participant Survey – Pre-Training

Instructions: The questions below ask for some information related to today's P2P training session. Detailed write-in comments are encouraged. Please use a separate sheet of paper if you need additional space.

1. How many P2P training sessions have you attended? (Check one)

___ None   ___ One   ___ More than One   ___ Five or Less   ___ More than Five

Comments and Suggestions:

2. What are you expecting to learn from this session?

3. How would you rate your knowledge on the topic covered in this session? Check one.

___ 1   ___ 2   ___ 3   ___ 4   ___ 5

Inadequate   Good   Superior

Comments and Suggestions:

P2P Participant Survey – Post-Training

Instructions: The questions below ask for your opinions about the P2P training session you participated in today. Write-in comments, both positive and negative, are encouraged. Please use a separate sheet of paper if you need additional space.

1. What did you learn from this session?

2. How would you rate your knowledge of the topic covered in this session?
Check one. ___1   ___2   ___3   ___4   ___5
             Inadequate   Good   Superior

3. How much do you agree that the P2P training session:	Circle one for each item.				
	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
a. Facilitated development of sound TTPs	1	2	3	4	5
b. Encouraged me to explore all aspects of the TTPs	1	2	3	4	5
c. Achieved a good balance with speaking and listening	1	2	3	4	5
d. Enabled me to learn effectively with the right focus	1	2	3	4	5
e. Acknowledged my thoughts and insights accurately	1	2	3	4	5
f. Answered all my questions satisfactorily	1	2	3	4	5
g. Took advantage of group interaction	1	2	3	4	5

4. What problems or obstacles did you encounter during the session?

5. To what extent do you think today's session will help you prepare for future operations?

6. What did you like best about the session?

7. What did you like least about the session?

Comments and Suggestions

Facilitator Session Assessment Form

Leader Name:		**Date of P2P Training Session:**	
1. Session and topics covered (briefly describe):		**Positive Points**	**Negative Points**
		6. The session in general:	
2. Most relevant session components:		**7. Managing the group:**	
3. Number of participants:		**8. Your facilitation:**	
4. Additional information (factors which influenced the success of your session):		**9. Activities used:**	

5. To what extent were the following present?

	Never	Sometimes	Often	Always
Problem solving	1	2	3	4
Articulating ideas	1	2	3	4
Agreement on ideas	1	2	3	4
Disagreement on ideas	1	2	3	4
Debate on ideas	1	2	3	4
Clarifying concepts	1	2	3	4

10. Points to remember for next session:

Facilitator Socratic Questions

Facilitate the Session	Example Facilitator Questions
• Keep the Soldiers involved in the discussions. • Use questions to encourage group discussion in a manner which makes the Soldiers do the thinking and talking. • Enable Soldiers to process information rather than looking for a single "correct" answer. • Stimulate the internalization of new information by causing Soldiers to employ critical thinking. • Require Soldiers to clarify the information, put the information in their own words, and relate it to their own knowledge base and experience. • The facilitator must follow the discussions closely in order to recognize when he needs to engage in the dialog. • Use open-ended questions to guide dialog back to the group.	• What are the key considerations in planning...? • What are the key considerations in preparing...? • What are the key considerations in executing...? • What are the key considerations in assessing...? • What Soldier training needs to be conducted to achieve...? • What leader training needs to be conducted to achieve...? • What unit training needs to be conducted to achieve...? • What are some situations in which that has worked? • How many people were involved in the operation? • Please explain the roles and responsibilities of those involved in the operation? • What were your roles and responsibilities in the operation? • How much time does it take to conduct that task/mission? • What are some pitfalls to watch for when conducting...? • What is the history behind how your unit evolved to that? • What is the sequence of ... to best accomplish that? • Have any other units/personnel had similar experiences? • What are some other ways to accomplish this? • Has anyone approached a similar situation differently? • Could you explain that in a more detail? • Please clarify what you mean by.... • Can you be more specific? • In what way? • Could you give an example of that?
Encourage participation	• What evidence supports that conclusion? • How has that worked for your organization? • How would you do that? • How can you be sure of that? • How might someone argue against that point? • What makes you think that? • How did you reach that conclusion? • Would anyone like to add to that? • What could be improved upon? • What experiences have you had which led you to that conclusion? • Can anyone else elaborate on that more? • How did you arrive at that? • What do you mean by...? • Has anyone else encountered this type problem? • What do we need to know in order to solve the problem? • Are there any assumptions involved in reaching that conclusion? • Is there anything else you would like to add? • How would you go about determining the facts associated with that situation? • What resources are required to conduct that...?
• Use Soldiers' names. • Use Socratic questioning so that Soldiers break down complex issues into smaller parts that can be more easily addressed. • Get Soldiers to use the tools available (whiteboard, butcher board, etc.) • Wait long enough for Soldiers' to respond rather than jumping in with the answer or another question. • Use positive reinforcement.	

Example Unit P2P Facilitator Training Plan

A unit may be designated to provide P2P facilitators for multiple P2P sessions which will be conducted simultaneously or within a certain timeframe. In these circumstances, the unit may elect to centralize facilitator training in order to standardize training and optimize resources available. The following guidelines may be used to establish and conduct a unit facilitator training program.

Facilitator training concept. The facilitators designated to conduct P2P training will conduct training as a group before facilitating sessions with their target audience. This will enable facilitators to practice P2P techniques among themselves before conducting a P2P session. All group discussion formats and collaborative learning techniques will be used at least once during the facilitator training. This will enable each facilitator to actively participate in a demonstration of the different formats and techniques. A hotwash will be conducted after each facilitator training session to capture P2P facilitation lessons learned.

Unit responsibilities.
- Determine the number of facilitation sessions that need to be conducted. Sessions to be conducted will usually be assigned according to duty positions or focus topics.
- Assign Soldiers facilitator responsibilities. Assign one Soldier as the primary facilitator for each session. These Soldiers should have experience in the session's topic.
- Designate the date, time, and location where the P2P facilitator training sessions will occur.
- Designate one Soldier as the Lead Trainer with responsibility for developing, delivering, and assessing the facilitator training.
- Provide resources to support the facilitator training. These requirements should be identified by the Lead Trainer.

Lead Trainer responsibilities.
- Coordinate for resources to conduct the facilitator training.
- Assign each facilitator responsibilities to Develop, Deliver, and Assess a P2P facilitation session during facilitator training (the session topic during facilitator training should be the same as the topic assigned by the unit when possible).
- Assign each facilitator responsibilities to demonstrate specific group discussion formats and collaborative learning techniques during their session (facilitators may elect to use different group formats and collaborative learning techniques during their actual sessions).
- Develop and publish a schedule for the facilitator training sessions.
- Supervise the delivery and assessment of the facilitator training sessions.
- Conduct a facilitator training hotwash after each session (see Hotwash Example below).

Facilitator responsibilities.
- Use the P2P Facilitator's Guide to develop, deliver, and assess the assigned P2P training session.
- Participate in P2P sessions conducted by other facilitators.

Facilitator Training Hotwash Example

Facilitator Training Hotwash Goals
- Soldiers identify ways to improve facilitation skills.
- Discuss facilitation processes used during each session.
- Address Soldiers' issues or concerns with facilitation.
- Note: the facilitator's skills and performance are the topic of interest, not the subject matter discussed.

Facilitator Training Hotwash questions

Develop
- Was a training objective developed? Was the training objective measureable? What other options for a measurable training objective could have been established?
- Were session rules identified? Were session rules effective? How could session rules be improved?
- Was an agenda developed? Was the agenda followed? What techniques were used to keep the session on track with the agenda?
- How would you improve the development of a P2P session?

Deliver
- Was a pre-assessment of participant knowledge conducted? What worked well with the pre-assessment? How could the pre-assessment be improved?
- What group discussion formats were used? What aspects of the group discussion formats worked well? How could group discussion formats be improved?
- How did the facilitator encourage Soldier participation? What techniques were effective at encouraging Soldier participation? How could Soldier participation be improved?
- What collaborative learning techniques were used? What aspects of the collaborative learning techniques worked well? How could the use of collaborative learning techniques be improved?
- Did the facilitator use guided questioning? What aspects of guided questioning worked well? What aspects of guided questioning could be improved?
- What training aids were used during the session (slides, whiteboard, butcher paper, etc.)? How did the use of training aids improve the session? How could the use of training aids be improved?
- How well did the Soldiers engage and participate? How could Soldier participation be improved?
- Did the facilitator provide feedback to the Soldiers during the session? Was the feedback effective? What elements of providing feedback could be improved?
- How would you improve the delivery of a P2P session?

Assess
- Was a post-assessment of participant knowledge conducted? What worked well with the post-assessment? How could the post-assessment be improved?
- How would you improve the assessment of a P2P session?
- How well was the facilitator able to apply the procedures in the Facilitator's Guide?
- How well did the facilitator answer Soldiers' questions?

Acronyms and Abbreviations

AO	Area of Operations
F2F	Face-to-Face
FOB	Forward Operating Base
P2P	Peer-to-Peer
SOP	Standing Operating Procedures
TTP	Tactics, Techniques, and Procedures
VTC	Video-teleconferencing

Resources

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